January 5, 2010 | Updated: January 26, 2010

Topic Overview: Social CRM Goes Mainstream

by William Band and Natalie L. Petouhoff, Ph.D.
for Business Process & Applications Professionals

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by William Band and Natalie L. Petouhoff, Ph.D.
with Connie Moore and Andrew Magarie

EXECUTIVE SUMMARY

Forrester's customer relationship management (CRM) research helps business process professionals embrace best practices — from process optimization to technology implementation — to improve customer interactions and drive top-line growth. Our research spans the business processes that support sales, marketing, customer service, the related topics of customer business intelligence, and data management. We are researching how the rise of the social Web affects the way customers buy from and interact with organizations of all types — a phenomenon that has become known as social CRM. Business process professionals should follow Forrester's seven steps for social CRM success: 1) initiate social CRM experiments immediately; 2) benchmark customer and prospect social readiness; 3) define your social customer objectives; 4) assess your social CRM capabilities; 5) understand the social CRM solutions landscape; 6) map out your social CRM capabilities-building plan; and 7) define your CRM metrics for success.

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NOTES & RESOURCES

We've compiled Forrester's most pertinent research on the rise of Social Computing and its impact on customer relationship management to provide an overview of our research and perspectives on this subject for business process professionals.

Related Research Documents

"Best Practices: Five Strategies For Customer Service Social Media Excellence"
August 14, 2009

"The Future Of The Social Web"
April 27, 2009

"CRM 2.0: Fantasy Or Reality?"
November 13, 2008

"The Growth Of Social Technology Adoption"
October 20, 2008

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WHY SOCIAL CRM MATTERS

A hot topic of debate among customer management and business process thought leaders right now is ascertaining the business value of "social CRM." Social technologies are proliferating rapidly. More than four in five US online adults now participate socially (see Figure 1).[1] Forrester's recent survey of 286 companies shows that while only 21% have established, for example, customer community interaction sites, an astonishing additional 42% are piloting or are interested in implementing customer communities.[2] Our research also spotlights that the ROI for social media applied to specific use cases, like customer service, can be attractive.[3]

Cutting through all the hype, our clients are challenged to make hard decisions about the level of investment they should make in Social Computing technologies like blogs, wikis, forums, customer feedback tools, social networking sites, and customer community platforms. And they want to know how these new capabilities should be, and can be, integrated with their transactional CRM systems.

How will these technologies change the customer management solution landscape that business process professionals have to navigate? We believe that you need have a clear understanding of the emerging extended CRM solution ecosystem.[4] Forrester defines this ecosystem to be the key technologies that support the business processes for targeting, acquiring, retaining, understanding, and — very importantly — collaborating "socially" with customers. It's this combined vision of all of the supporting technologies that makes up the modern customer management process around which CRM ecosystem vendors and business process professionals should design their future plans (see Figure 2).

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Figure 1 More Than Four In Five US Online Adults Now Participate Socially

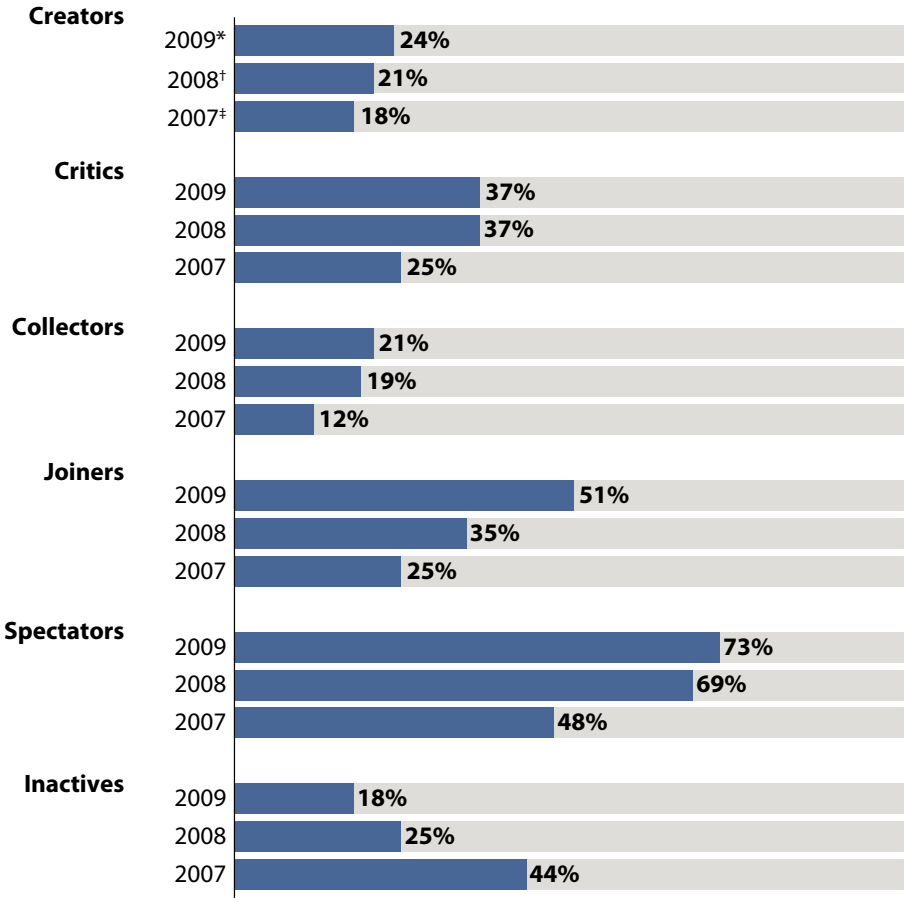

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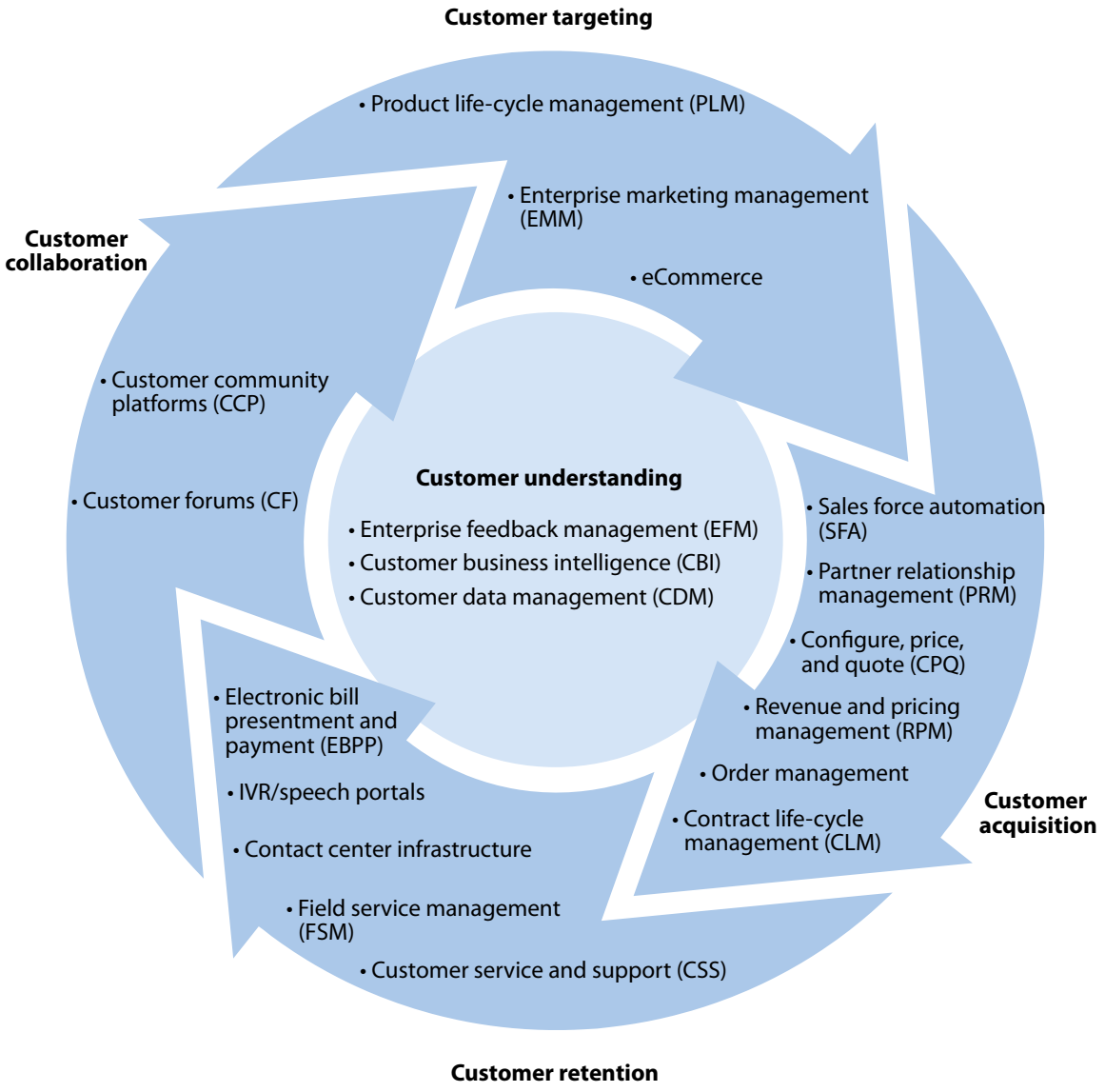
Figure 2 The Extended CRM Application Ecosystem



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FORRESTER'S TAKE ON SOCIAL CRM

The phenomenon of the social Web — which Forrester calls Social Computing — is forcing business process professionals to expand their thinking beyond the goal of optimizing a two-way relationship between an enterprise and customer to also include the simultaneous interactions that customers have among themselves.[5] CRM is evolving from its traditional focus on optimizing customer-facing transactional processes to include the strategies and technologies to develop collaborative and social connections with customers, suppliers, and even competitors (see Figure 3).

In this new world, traditional CRM solutions will continue to aggregate customer data, analyze that data, and automate workflows to optimize business processes. But business process professionals must find innovative new solutions to engage with emerging social consumers, enrich the customer experience through community-based interactions, and architect solutions that are flexible and foster strong intra-organization and customer collaboration.

A torrent of new acronyms and labels spill forth from consultants, analysts, and other pundits to put a label on this new definition of CRM, for example: "social CRM," "collaborative CRM," and "CRM 2.0." Does it matter at this point what the next generation of CRM thinking and solutions is called? Not really. What is important is that you embrace new ideas about customer behaviors, innovative business capabilities, and fresh technologies as part of your CRM solutions understanding and vocabulary.

So what do you need to do to be a winner? Follow Forrester' seven steps for success for strategizing, selecting, and deploying social CRM solutions:

1. **Initiate social CRM experiments immediately.** Define a near-term opportunity to apply social CRM ideas to a customer-facing challenge at your company. Build some practical experience that will break out of your of old mindsets. Refine your strategies later as new insights emerge. For example, 10 years ago, Electronic Arts recognized that could not cope with the anticipated tenfold increase in customer support inquiries as the result of launching large-scale online multiplayer games. No commercial solutions were available to help at the time, so Electronic Arts began experimenting and developing its own solutions. Trying new ideas and discarding the old, EA actively worked to gain hands-on experience by actively participating in the virtual worlds of its social game players.

2. **Benchmark customer and prospect social readiness.** Survey your customers to assess their Social Computing behavior and attitudes. Use Forrester's Social Technographics® as a framework for assessing whether prospects and customers are willing to comment on blogs, contribute content to online forums or wikis, or view online video segments (see Figure 4).[6] Use the resulting segment profiles to design interaction plans that align with their current social behaviors and preferences. For example, Linksys has discovered a whole world of "super users" who are willing to provide support to their peers for free. Lego has capitalized on an already successful independent user group to recruit brand ambassadors to stimulate increased social interactions that were already emerging in the buyer community.

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3. **Define your social customer objectives.** The most important decision is not what technology to use; most important is determining who you're trying to reach, what you're trying to accomplish, and how you plan to change your relationships with your customers. At Forrester, we advocate using a systematic, four-step method for next-generation customer management strategy formation. The acronym for the four steps is POST: people, objectives, strategy, and technology.[7] For example, IHG, the hotel chain giant, wanted to forge deeper relationships with customers through social engagement, so it focused its attention on the social CRM objective of doing more "talking" with customers and fostering ongoing dialogue with its community of travelers (see Figure 5).

4. **Assess your social CRM capabilities.** Undertake a self-assessment to understand how your organization stacks up compared with CRM best practices and identify where you should focus your attention for quick wins (see Figure 6).[8] For example, LucidEra knew that as a young Internet company it needed to improve its sales capabilities quickly to meet ambitious growth targets. It focused attention on finding a social buyer data solution to empower its inside sales people with deep insights about prospects in advance of making sales calls.

5. **Understand the social CRM solutions landscape**. You must learn to navigate an emerging CRM solutions landscape that includes both traditional solutions and new Social Computing capabilities (see Figure 7).[9] For example, Citrix looked for one year to find the right community technology platform and community facilitation vendor to help it realize its vision for interacting and listening to customers using methods beyond its small customer advisory councils and traditional market research techniques.

6. **Map out your social CRM capabilities-building plan.** A social CRM plan should be tightly linked to business goals, focused on customer benefits, clearly identify the processes and constituencies that will be affected, and specify the associated information and capabilities required.[10] For example, Dell implemented IdeaStorm to gather new ideas from customers. But it has also systematically defined processes to synthesize the ideas, allocate them to individuals and departments within Dell for further refinement and evaluation, and finally, implement the best concepts.

7. **Define your CRM metrics for success**. Exceptional discipline is what sets CRM winners apart from failures. Social CRM comprises both a strategy and a set of tools, but you also need to pay attention to how well you are tracking toward your goals over the long term. Establishing the right metrics is part of the discipline that leads to success. You need traditional CRM metrics like: email marketing offer click-through rates; sales opportunity close ratios; and first-time call resolution ratios (see Figure 8).[11] And you need to think about new social "sentiment" measures like social conversation buzz, reach, and value (see Figure 9).[12] P&G calculated that its beinggirl.com site and community is four times more effective than advertising in reaching its target consumers, which provided justification for rolling out the initiative to nearly 30 countries.

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Figure 3 The Old Customer Relationship Model Versus The New

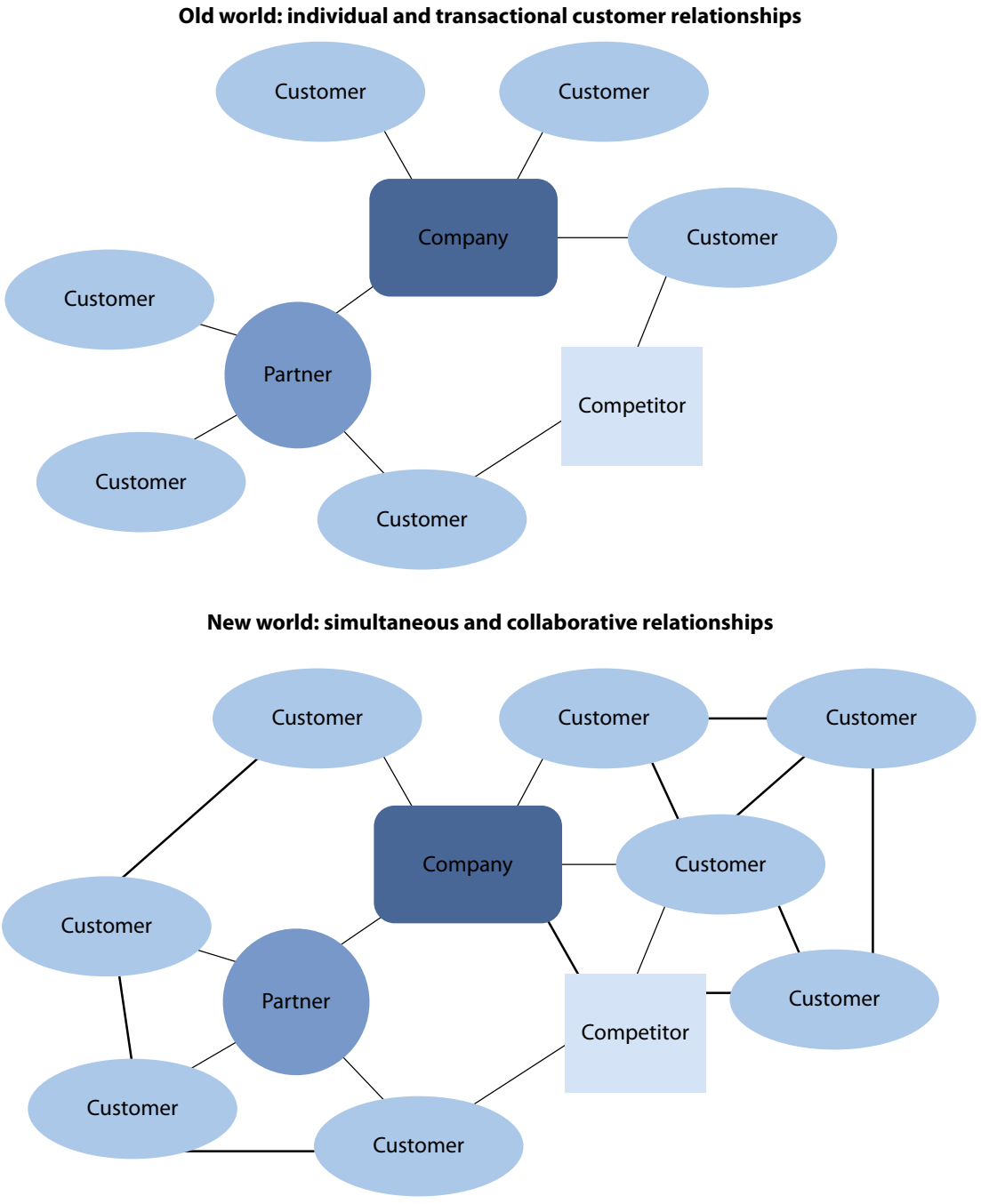

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Figure 4 The Social Technographics® Ladder

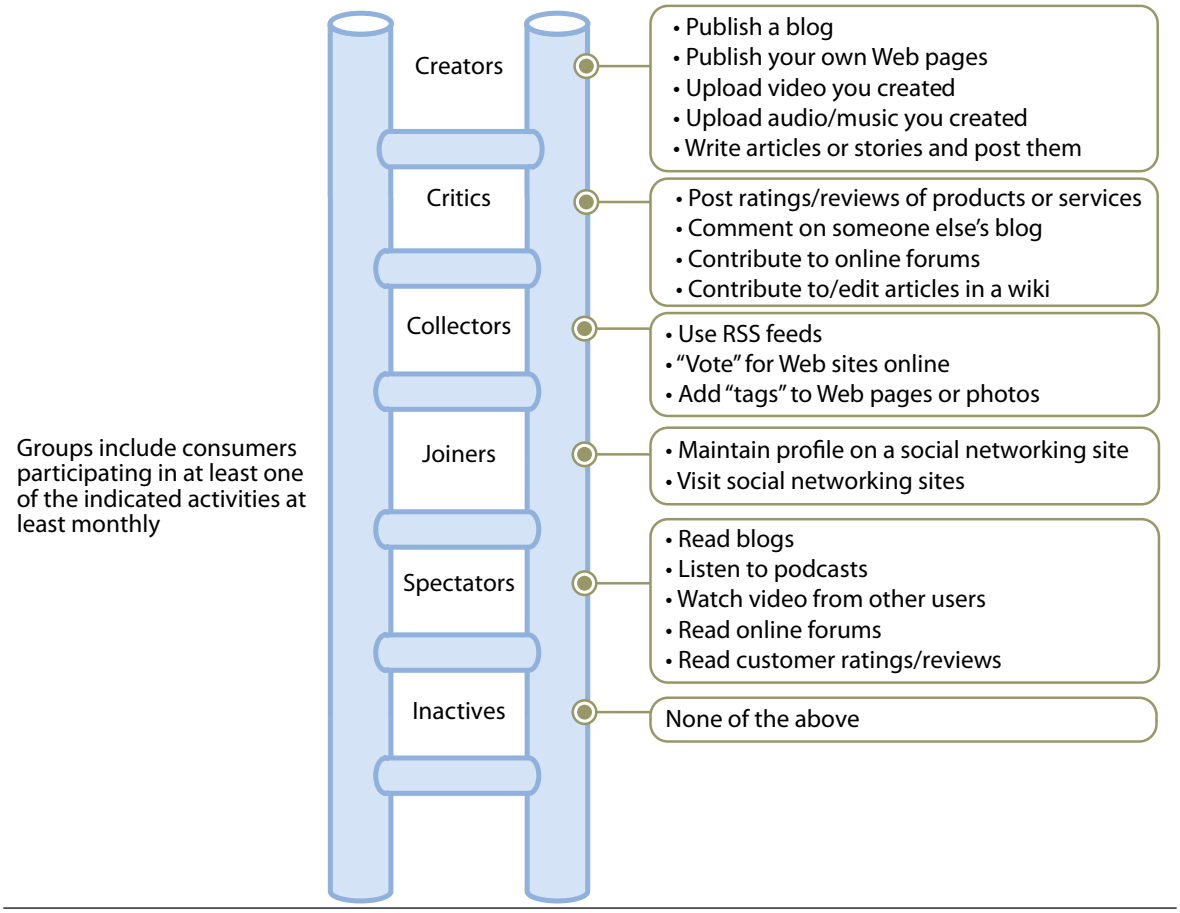

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Figure 5 Social CRM Objectives And Capabilities

Business function	Social CRM objective	CRM 2.0 capabilities
Market research	Listening	Ongoing monitoring of your customers' conversations with *each other*, instead of occasional surveys and focus groups
Marketing	Talking	Participating in and stimulating two-way conversations customers have with *each other*, not just outbound communications to customers
Sales	Energizing	Making it possible to for enthusiastic customers to help sell or make introductions to *each other*
Support	Supporting	Enabling your customers to support *each other*
Product/service development	Embracing	Helping customers work with *each other* to come up with ideas to improve products and services

Source: Adapted from Charlene Li and Josh Bernoff, *Groundswell: Winning in a World Transformed by Social Technologies*, Harvard Business Press, 2008

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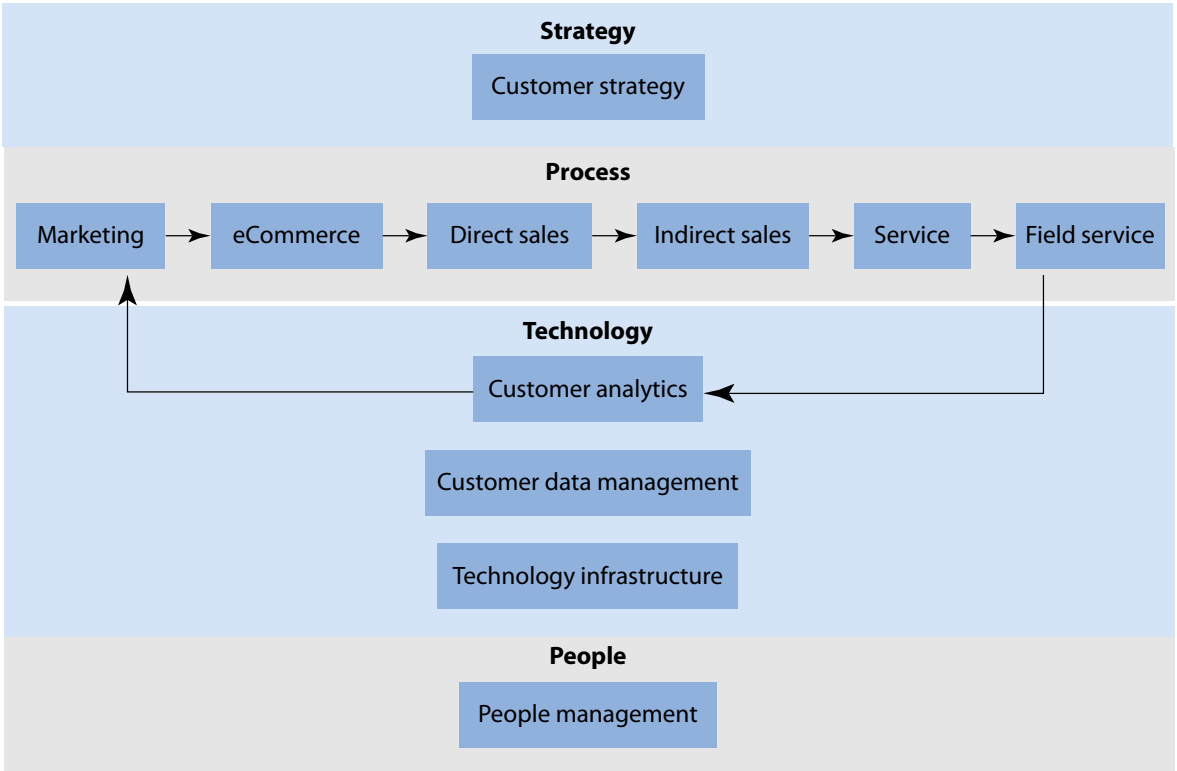
Figure 6 The Forrester Best Practices Framework For CRM



Source: August 24, 2007, "Forrester's Best Practices Framework For CRM" report

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Figure 7 The Next-Generation CRM Solutions Landscape

Business function processes	Social collaboration processes
Market research	**Listening**
Role: Gather and analyze customer and market facts to identify the most valuable prospects and customers **Example solutions:** SAS Institute, SPSS, Teradata	**Role:** Develop a sounding board for researching decisions **Example solutions:** Private communities: Cerado (Haystack), Communispace, MarketTools, Think Passenger **Role:** Monitor "buzz" to measure ongoing trends and perceptions **Example solutions:** Brand monitoring: MotiveQuest, Nielsen BuzzMetrics, TNS MI/Cymfony, Umbria
Marketing	**Talking**
Role: Raise awareness of products and services and communicate value proposition to best prospects **Example solutions:** Alterian, Aprimo, Chordiant, Infor (Epiphany), Loyalty Lab, Unica	**Role:** Let most loyal customers (fans) spread messages more easily **Example solutions:** Social networks: Facebook, MySpace **Role:** Communicate continually with customers and monitor responses **Example solutions:** Blogs: Google Blogger, Six Apart, WordPress; Customer feedback: confirmit
Sales	**Energizing**
Role: Identify decision-makers, make contact, and secure orders **Example solutions:** Entellium, FrontRange GoldMine, Maximizer, Microsoft, Oracle E-Business Suite CRM, Oracle PeopleSoft CRM, Oracle Siebel CRM, Oracle Siebel CRM On Demand, Pivotal CRM, Sage SalesLogix, salesforce.com, SAP CRM	**Role:** Use customer opinions to boost sales **Example solutions:** Ratings and reviews: Bazaarvoice, PowerReviews **Role:** Designate lead customers to energize others **Example solutions:** Brand ambassador programs **Role:** Gain introductions to most influential network members **Example solutions:** Influencer network mapping: Cerado (Haystack), Contact Networks, Generate, Jigsaw Data, LinkedIn, Plaxo, SAVO, SelectMinds, Visible Path
Service	**Supporting**
Role: Remediate problems with products and services to build loyalty **Example solutions:** Amdocs, Consona (KNOVA), Consona (Onyx), eGain, FrontRange, Graham Technology, KANA, Numara, Pegasystems, RightNow Technologies, Talisma	**Role:** Enable customers to solve each others' problems **Example solutions:** Support forums: Jive Software, Lithium Technologies, Prospero Technologies **Role:** Enable customers to build solutions together **Example solutions:** Wikis: Confluence, Socialtext, Wikia
Product/service development	**Embracing**
Role: Develop, engineer, and provision new products and services quickly and efficiently **Example solutions:** Dassault Systèmes, PTC, Oracle, SAP, Siemens' UGS PLM Software	**Role:** Harvest customer ideas in a public setting **Example solutions:** Idea community: Chordiant Mesh, salesforce.com AppExchange **Role:** Cultivate dedicated idea-generating community **Example solutions:** Private community: Communispace, MarketTools

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Figure 8 Examples Of CRM Metrics

Marketing metrics	Sales metrics	Service metrics
• Number of campaigns • New customer retention rates • Number of responses by campaign • Number of purchases by campaign • Revenue generated by campaign • Cost per interaction by campaign • Number of new customers acquired by campaign • Customer retention rate • Number of new leads by product • Number of customer referrals	• Number of prospects • Number of new customers • Number of retained customers • Number of open opportunities • Close rate • Renewal rate • Number of sales calls • Number of sales call per opportunity • Amount of new revenue • Amount of recurring revenue • Time-to-close by channel • Margin • Sales stage duration • Sales cycle duration • Number of sales calls made • Number of proposals given • Competitive knockouts	• Cases closed same day • Number of cases handled by agent • Number of service calls • Average number of service requests by type • Average time-to-resolution • Average number of service calls per day • Percentage compliance with service-level agreement (SLA) • Percentage of service renewals • Customer satisfaction level • Complaint time-to-resolution • Propensity for customer defection

Source: October 1, 2007, "The Right CRM Metrics For Your Organization" report

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Figure 9 Ten Commonly Used Listening Platform Metrics

Metric	Description
Conversation buzz	The amount of discussion around certain topics, generally determined by the number of responses to blog posts or online discussions. A widely read news site may post a story, but if there are no comments and no readers discussing the topic, then it shows little consumer interest.
Conversation value	The revenue contribution of a conversation about a particular product or brand. Proposed by Chat Threads, this metric comes from understanding how conversations spread through different channels and the incremental value each conversation adds to the brand's bottom line.
Conversation volume	The number of social media entities (blog posts, forum discussions, tweets, etc.) discussing a topic. Volume is a stronger metric when measured over time — marketers use conversation volume to set baselines for future campaigns.
Demographic metrics	The collection of metrics making up the background details of online consumers. Listening platforms can collect data on consumer location, gender, and age. Marketers use demographic data to determine whether their campaigns reach targeted consumers.
Level of influence	The authority of an online consumer, measured by his or her overall reach online. A consumer with a highly read blog and thousands of Twitter followers is assigned a high influence score, while a commenter on a small forum has low influence.
Message reach	The number of eventual impressions of an online discussion. Measured by the number of different sources covering a topic and each source's potential page views. Many discussions start small, but once picked up by a larger source, will reach a large number of consumers.
Sentiment type	The positive or negative attitudes consumers express, scored positive, negative, or neutral. Although many online brand mentions are neutral, containing no sentiment, listening platforms track adjectives around keywords to determine consumers' tonality about a topic.
Share of voice	The ratio of discussion volume between multiple brands — often represented as a percentage pie chart. Many marketers track their brands against competitors' to determine which company has a larger share of voice.
Topic frequency	The most common themes for consumer discussion around a brand. Marketers use topic frequency data to collect insight into how consumers view their brands and how they discuss them online.
Virality	The amount and speed at which a discussion spreads, measured by the number of different entries around the same topic within a certain time period. Around a highly viral event, such as the Motrin Moms saga, hundreds of bloggers write posts in the following days.

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STRATEGIC READING

Strategic research gives you Forrester's view on the broader context of CRM and how organizations can build strategies that support their long-term social CRM vision.

- CRM 2.0: Fantasy Or Reality?
  William Band
- Social Computing
  Chris Charron, Jaap Favier, Charlene Li
- TechRadar™ For BP&A Professionals: The Extended CRM Application Ecosystem, Q3 2009
  William Band
- The CRM 2.0 Imperative
  William Band
- The Growth Of Social Technology Adoption
  Josh Bernoff
- The ROI Of Online Customer Service Communities
  Natalie L. Petouhoff, Ph.D.
- Trends 2009: Customer Relationship Management
  William Band

BEST PRACTICES

Forrester's best practices research helps you identify areas where your CRM strategies, processes, and technologies need to mature. This research is designed for organizations embarking on the path to assessing and improving their current social CRM programs or for jump-starting programs that are just getting off the ground.

- Answers To Five Frequently Asked Questions About CRM Projects
  William Band
- Best Practices: Five Strategies For Customer Service Social Media Excellence
  Natalie L. Petouhoff, Ph.D.
- Best Practices For CRM Deployment
  William Band
- Best Practices: Getting The Most From Your CRM Deployment
  William Band

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- Best Practices: The Smart Way To Implement CRM SaaS Solutions
  William Band, Pete Marston
- CRM Best Practices Adoption
  William Band
- Eight Ways To Mine Value From Your CRM Systems
  William Band
- Forrester's CRM Risk Evaluation Self-Assessment Tool
  William Band
- The Right CRM Metrics For Your Organization
  William Band
- The ROI Of CRM Application Upgrades
  William Band

TRENDS AND FORECASTS

In trends and forecasts research, Forrester interprets current trends in technology and how they are expected to shape the future. Trends and forecasts research helps organizations align their CRM initiatives with business process and technology developments and the evolving changes in customer behaviors.

- Craft Your CRM Investment Plans In Light Of Technology Adoption Patterns
  William Band
- The Future Of The Social Web
  Jeremiah K. Owyang
- The Social Technographics® Of Business Buyers
  Laura Ramos, G. Oliver Young
- The Social Tools Consumers Want From Their Favorite Brands
  Josh Bernoff, Cynthia N. Pflaum
- The Top 15 Technology Trends EA Should Watch
  Alex Cullen
- To Invest Wisely, Know The Business Value Of Diverse CRM Solutions
  William Band

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VENDOR AND PRODUCT COMPARISONS

Knowing what to do is half the battle; knowing who can help get you there is the other half. A broad range of options exist for both traditional CRM and new social CRM solutions. Through the Forrester Wave™ and other comparative research, Forrester helps you understand the strengths and weaknesses of vendors and their offerings.

- The Forrester Wave™: Community Platforms, Q1 2009
  Jeremiah K. Owyang
- The Forrester Wave™: Cross-Channel Campaign Management, Q4 2009
  Suresh Vittal
- The Forrester Wave™: Customer Hubs, Q3 2008
  R "Ray" Wang
- The Forrester Wave™: Customer Service Software Solutions, Q4 2008
  Natalie L. Petouhoff, Ph.D.
- The Forrester Wave™: Enterprise Business Intelligence Platforms, Q3 2008
  Boris Evelson
- The Forrester Wave™: Enterprise CRM Suites, Q3 2008
  William Band
- The Forrester Wave™: Listening Platforms, Q1 2009
  by Suresh Vittal
- The Forrester Wave™: Sales Force Management, Q4 2008
  by Pete Marston
- Topic Overview: Business Intelligence
  Boris Evelson

CASE STUDIES

Forester cases studies help understand how organizations have implemented business solutions in the real world. Learn what works and what pitfalls to avoid.

- 2009 Forrester Groundswell Awards Winners Offer B2B Tech Marketers Valuable Social Media Lessons
  Laura Ramos

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- Case Study: Cisco Consumer Business Group Builds The Business Case For Social Media
  Natalie L. Petouhoff, Ph.D.
- Case Study: Intel Uses Social Media To Transform The Customer Experience
  Natalie L. Petouhoff, Ph.D.
- Case Study: Intuit TurboTax Uses Crowd Wisdom To Make Online Support Less Taxing
  Laura Ramos
- Case Study: Lenovo Takes Ownership Of Social Media To Reduce Customer Service Costs
  Natalie L. Petouhoff, Ph.D.
- Case Study: MetricStream Builds B2B Community With Compliance Online
  Laura Ramos
- Case Study: NetApp Marketing Takes Ownership Of Its Community Initiative To Ensure Success
  Chip Gliedman, Natalie L. Petouhoff, Ph.D.
- Case Study: P&G's BeingGirl.com Builds Lasting Brand Loyalty
  Lisa Bradner

RELATED TOPICS

The following reports are also helpful for business process professionals striving to improve the customer-facing capabilities at their organizations.

Customer Experience

Forrester's customer experience research helps customer experience professionals compete effectively in a world where empowered consumers are becoming harder than ever to win and keep. Key topic areas include benchmarking customer experience, building the business case for change, and transforming organization, culture, and process.

- Customer Experience Boosts Revenue
  Bruce D. Temkin
- Customer Experience Predictions For 2009
  Megan Burns
- How Customer Experience Drives Word Of Mouth
  Bruce D. Temkin

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- The Customer Experience Journey
  Bruce D. Temkin

Marketing

Forrester's research about marketing addresses how marketers use business technologies to better understand, target, and communicate with their customers and tracks key trends and vendors in this sector.

- B2B Lead Management Automation Market Overview
  Laura Ramos
- B2B Marketers: Tap Into Social Networking Sites To Energize Community Marketing
  Laura Ramos
- Campaign Management Needs A Reboot
  Suresh Vittal
- How B2B Technology Buyers Use Social Media
  Laura Ramos
- Marketing Leaders Take On Technology
  Lisa Bradner
- Marketing Technology Adoption 2009
  Suresh Vittal
- Social Brand Strategy
  Lisa Bradner
- The Intelligent Approach To Customer Intelligence
  Dave Frankland
- Understanding The Marketing And IT Relationship
  Suresh Vittal, Jennifer Joseph McGann

Direct And Indirect Sales

Forrester's sales research helps CRM professionals in large companies, as well as smaller businesses, improve sales processes, select effective sales support technologies, and implement sales enablement strategies. We research best practices for companies using both direct and/or indirect sales models.

- A Systematic Approach To Strategic Account Programs Improves Tech Sales Performance
  Scott Santucci

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- Engineering Valuable Sales Conversations
  Scott Santucci

- Fifteen Vendors To Bridge Your SFA Gaps
  Pete Marston

- Market Overview: SFA And PRM Solutions
  Pete Marston

- Optimize Performance By Driving Enterprise Sales Outcomes
  Scott Santucci

- Uncovering The Hidden Costs Of Sales Support
  Scott Santucci

Service

Forrester's customer service and support research addresses how organizations manage post-sales activities including face-to-face, mail, telephone, and Internet-related activities.

- Customer Service: A Keystone Of Your Corporate Revenue Strategy
  Natalie L. Petouhoff, Ph.D.

- How To Win Funding For Your Customer Service Project
  Natalie L. Petouhoff, Ph.D.

- Next-Generation Contact Centers
  Elizabeth Herrell

- Ten Steps For Reducing Contact Center Expenses
  Elizabeth Herrell

- The Economic Necessity Of Customer Service
  Natalie L. Petouhoff, Ph.D.

Customer Data/Analytics

Customer data integration and analytics represent the intersection of technology solutions and a category of packaged application software that operationalizes the acquisition, distribution, and management of customer information for use in both CRM and other systems. Our research covers the important trends in customer data management, analytics, and reporting.

- Fit Your Data Architecture To Your Analytical Needs
  Boris Evelson, Rob Karel

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- Refresh Your Information Management Strategy To Deliver Business Results
  Rob Karel, James G. Kobielus
- The Business Case for BI: Now More Critical Than Ever
  Boris Evelson
- The Marketing And Customer Analytics Software Landscape
  Suresh Vittal
- The ROI Of Master Data Management
  Rob Karel

FOR MORE INFORMATION

Analysts To Watch

Forrester is continuously researching, analyzing, and writing about changes and new developments in business technology. To keep abreast of future Forrester research on the subject of CRM and Social Computing, you may want to watch for new research coming from the following Forrester analysts:

- **William Band.** Bill is a vice president and principal analyst who primarily contributes to Forrester's offerings for the business process professional. He is a leading expert on customer management topics. His research focus is helping organizations establish and validate CRM strategies; prioritize and focus on CRM projects; build executive consensus; facilitate CRM vendor selection; and plan for project success.

- **Josh Bernoff.** Josh is a senior vice president at Forrester and co-author of the book *Groundswell: Winning in a World Transformed by Social Technologies. Groundswell* describes how people using social technologies like blogs, wikis, MySpace, and YouTube will threaten institutions of all kinds, and how companies can succeed in the face of this change.

- **Boris Evelson.** Boris is a principal analyst serving business professionals. He is a leading expert in business intelligence (BI) — a set of processes, methodologies, and technologies used to transform raw data into meaningful, useful, and action-oriented enterprise information.

- **Elizabeth Herrell**. Elizabeth is a vice president and principal analyst. Her current research is directed at leading trends, technologies, and best practices for converged voice and data communications, customer contact for premise-based and outsourced solutions, and multiple channel customer interactions.

- **Rob Karel.** Rob is a principal analyst serving business process professionals. He is a leading expert in how companies manage data and integrate information across the enterprise. Rob's

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current research focus includes master data management, data quality management, metadata management, data governance, and data integration technologies, including ETL and EII.

- **James G. Kobielus.** James is a senior analyst serving business process professionals. He is a leading expert on data warehousing, predictive analytics, data mining, and complex event processing. In addition to his core coverage areas, James contributes to Forrester's research in business intelligence, data integration, data quality, and master data management.

- **Natalie L. Petouhoff, Ph.D.** Natalie is a senior analyst serving business process professionals who work with customer service, customer relationship management, and social media to support customer-facing processes. She reviews customer service and CRM vendors' applications and provides IT and business process leaders with guidance on how to integrate social media applications and platforms into the contact center, as well as the emerging field of social CRM.

- **Laura Ramos.** Laura is a vice president and principal analyst who primarily conducts research for Forrester's clients who are B2B marketers, namely technology product management and marketing professionals and marketing leadership professionals. Her key research areas include tracking overall B2B marketing trends and issues, the integration of traditional and digital B2B marketing tactics, and emerging B2B marketing trends in social media use.

- **Scott Santucci.** Scott is a senior analyst serving technology sales enablement professionals. He is a leading expert on sales productivity issues such as sales enablement, messaging and positioning, go-to-market strategies, channel strategies, and competitive differentiation for software, services, and hardware providers within the technology industry.

- **Ted Schadler.** Ted is a vice president serving information and knowledge management professionals. With 21 years of experience in the software industry, Ted advises clients in a wide variety of industries on collaboration tools and practices. Ted's primary research objective is to help clients select and implement real-time collaboration tools and understand the impact of emerging technologies on information workers.

- **Bruce D. Temkin.** Bruce, a vice president and principal analyst, is one of the driving forces behind Forrester's offerings for customer experience professionals. He is a leading expert in how companies build differentiation with customer experience through corporatewide strategies and initiatives. His research focuses on the business strategies, operational processes, and organizational structures required to create and sustain superior customer relationships.

- **Suresh Vittal.** Suresh is a principal analyst serving customer intelligence professionals. His research agenda focuses on enterprise marketing technologies, database marketing strategies,

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customer analytics, and technologies that make customer insight operational. Suresh helps marketing clients navigate the ever-changing marketing technology landscape and develop data-driven marketing strategies.

Research Help Desk

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Research Alerts

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ENDNOTES

[1] Social technologies continue to grow substantially in 2009. Now more than four in five US online adults use social media at least once a month, and half participate in social networks like Facebook. While young people continue to march toward almost universal adoption of social applications, the most rapid growth occurred among consumers 35 and older. This means the time to build social marketing applications is now. Interactive marketers should influence social network chatter, master social communication, and develop social assets — even if their customers are older. See the August 25, 2009, "The Broad Reach Of Social Technologies" report.

[2] Navigating the multifaceted customer relationship management (CRM) technology landscape is challenging. To help CRM professionals make smart decisions, Forrester surveyed 286 companies to understand the adoption patterns for 19 types of customer management technologies. To win in today's difficult economic climate, you must choose the best opportunities for quick wins, spend wisely on the right CRM solutions, and implement them correctly. See the August 12, 2009, "Craft Your CRM Investment Plans In Light Of Technology Adoption Patterns" report.

[3] The early evidence indicates that social technologies are a sound choice because they provide an attractive ROI in a short period of time while delivering better customer experiences. See the June 30, 2009, "The ROI Of Online Customer Service Communities" report.

[4] Navigating the complex customer relationship management (CRM) technology landscape remains challenging — particularly in light of the rapid rise of Social Computing, the increasing adoption of software-as-a service (SaaS) solutions, and the need to provide mobile capabilities for front-line personnel. But by selecting the right solutions to invest in, CRM professionals can take the proper steps without taking unnecessary risk. See the July 9, 2009, "TechRadar™ For BP&A Professionals: The Extended CRM Application Ecosystem, Q3 2009" report.

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[5] Customer relationship management (CRM) is evolving from its traditional focus on optimizing customer-facing transactional processes to include the strategies and technologies to develop collaborative connections with customers, suppliers, and even competitors. See the March 10, 2008, "The CRM 2.0 Imperative" report.

[6] Forrester categorizes Social Computing behaviors on a ladder with six levels of participation and uses the term Social Technographics to describe attributes of buyer segments according to their participation on these levels. B2B marketers pursuing social tactics should analyze their customers' Social Technographics first and then create social marketing strategies based on this profile. See the April 19, 2007, "Social Technographics®" report.

[7] To help clients figure out how to best approach social media, Forrester introduced a systematic, four-step method for social strategy formation that we call POST. See the October 9, 2007, "Objectives: The Key To Creating A Social Strategy" report.

[8] To help understand how your organization stacks up against these best practices and to identify where you can best achieve quick wins, we created the Forrester FastForward self-assessment for CRM. Use the framework and self-assessment to improve your current CRM initiative or to jump-start new projects. See the August 24, 2007, "Forrester's Best Practices Framework For CRM" report.

[9] Customer relationship management (CRM) is evolving from its traditional focus on optimizing customer-facing transactional processes. See the March 10, 2008, "The CRM 2.0 Imperative" report.

[10] As consumers rapidly adopt social media — and use it to voice their displeasure about brands and complain about products and services — customer service professionals struggle with how best to harness the power of the cloud to transform customer experiences. Forrester's interviews with savvy executives found that smart companies use five emerging best practices. See the August 14, 2009, "Best Practices: Five Strategies For Customer Service Social Media Excellence" report.

[11] Forrester interviewed 58 executives about their best practices for getting more value from CRM. They told us that it is critical to set clear CRM objectives and establish the right metrics before making a technology purchase. See the October 1, 2007, "The Right CRM Metrics For Your Organization" report.

[12] The growing popularity and influence of social media makes listening a critical research and insight-generation activity. Marketers are turning to listening platforms to harvest the rich trove of consumer conversations generated across all social media including blogs, message boards, and social networks. See the May 29, 2009, "Listening Metrics That Matter" report.

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